PAYROLL MASTERS
Where Every Day is Payday™

NEW CLIENT SET-UP FORM

This New Client Set-Up form and all other forms included in this packet must be completed, signed and dated by a registered owner or officer in order to prevent any delays.

How did you hear about Payroll Masters?

☐ Sales Rep. ☐ Email ☐ Postcard ☐ Ad ☐ Hotsheet ☐ Bank Stuffer ☐ Friend ☐ Other _____

Current Payroll Method: ☐ In-house ☐ Outsource: _____ Number of Employees: _____

Common Name/dba: _____

Legal Name: _____
(Please include entity type ie. sole proprietary, LLP, LLC, INC, Non-Profit)

Contact Name: _____ Bank Name: _____

Company Address: _____

City: _____ State: _____ Zip: _____ Email: _____

Phone: _____ Cell Phone: _____ Fax: _____

PAYROLL TAX

Full TAX service? ☐ YES ☐ NO Federal TAX deposit requirement schedule? ☐ MONTHLY ☐ SEMI-WEEKLY

Federal - FEIN#

☐☐ - ☐☐☐☐☐☐☐

Do you have any agricultural employees? ☐ YES ☐ NO

CA State - SEIN#

☐☐☐ - ☐☐☐☐ - ☐

Other State - SEIN# State: _____

☐☐☐ - ☐☐☐☐ - ☐☐

FOR INTERNAL OFFICE USE ONLY

SUI Rate: _____%

SDI Rate: _____%

ETT: _____%

PAYROLL PROCESSING

PAY-Schedule: PAY-Day

☐ WEEKLY _____
☐ BI-WEEKLY _____
☐ SEMI-MONTHLY _____
☐ MONTHLY _____
☐ QUARTERLY _____
☐ ANNUALLY _____

PAY Cycle:

Start: _____ End: _____

Starting Check #: _____

Date of Last Payroll: _____

First Process Date: _____

☐ NO Payroll this Year ☐ Stuff & Seal

☐ Other special instructions _____

☐ MasterLink™
☐ Time & Attendance
☐ Workers' Comp ☐ The Online 401(k)
☐ HR Support Cntr ☐ HR On-Demand
☐ Background Checks
☐ HSA
☐ Personalized Logo Checks
☐ Other _____

DELIVERY INSTRUCTIONS

☐ Mail (priority 3-day, overnight, standard) ☐ Pick-up at Payroll Masters ☐ Drop Box (Napa, St. Helena, Healdsburg) ☐ Courier

LOCATION 1 ☐ Checks ☐ Reports ☐ Checks & Reports Attention: _____

Delivery Address: _____ City: _____ Zip: _____

LOCATION 2 ☐ Checks ☐ Reports ☐ Checks & Reports Attention: _____

Delivery Address: _____ City: _____ Zip: _____

LOCATION 3 ☐ Checks ☐ Reports ☐ Checks & Reports Attention: _____

Delivery Address: _____ City: _____ Zip: _____